MCO Portal Modifications for HMO and LTC MCO Users --

Member Search and Provider Search

Table of Contents:

Solution Summary

- With the implementation of interChange and the new ForwardHealth Portal, DHS will provide you with the ability to search on member and provider information and return detail screens similar to what you are currently getting using EDSNet screens. Because of the significant differences between the current MMIS and the new interChange system, there is not a one-to-one match between EDSNet screens and the new screens you will be given; however, we believe that these new screens will provide you with the information you have requested.

- Although the screens appear to have "Add", "Save" and "Delete" functionality, these buttons will be disabled for all MCOs. MCOs will only be allowed to "Search", "Clear" a search, and view the results that get displayed on the screens. MCOs will not be allowed to modify data on these screens in any way.

Accessing the Solution

- You will use your MCO portal account to access the Member and Provider information. You do not need a Partner Portal account.

- At implementation, you will be able to assign clerks under your MCO portal account access to the Member and Provider information screens. The screenshots below provide you with specific information on where this information will be found. The "role" that you assign to your clerks or clerk administrators in order for them to access this information will be called "member-prov information".

- You will not be limited on the number of clerks or clerk administrators you can set up, nor will you be limited on the number of clerks or clerk administrators that can be assigned this new role.

- Only Administrators (or Clerk Administrators who have been given authority to set up clerks) can assign the role of "member-prov information" to their clerks. Clerks cannot assign this role to themselves or to other Clerks. See the section below titled "Section 1: Assigning the New 'member-prov information' Role to Your Users".

Section 1: Assigning the New "member-prov information" Role to Your Users

The new functionality can be found on the Managed Care Organization Portal.
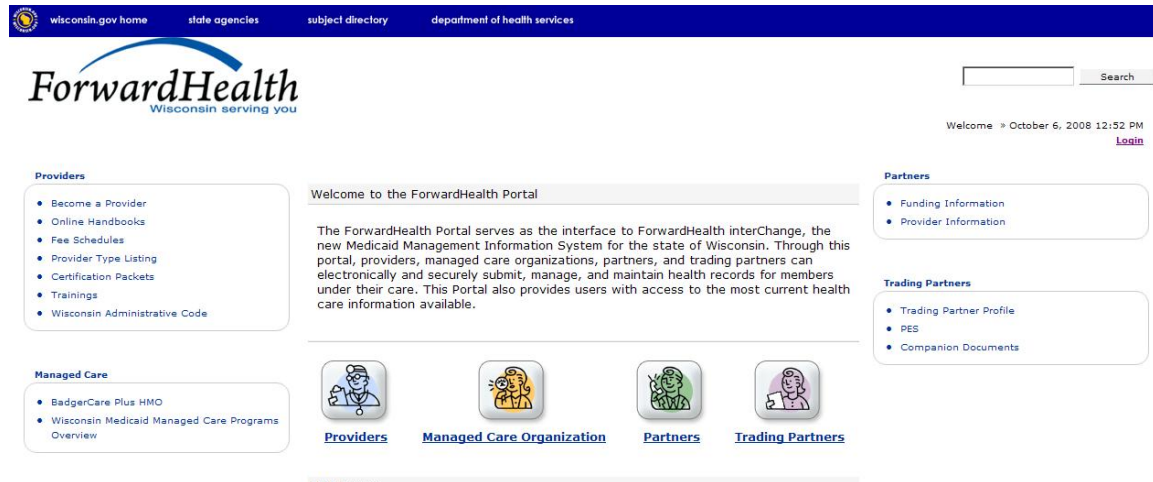
Administrators and Clerk Administrators can use the Account>>Clerk Maintenance screens to assign the new 'member-prov information' role to their clerks.

The new role will appear in the area circled in red in the screenshot below:
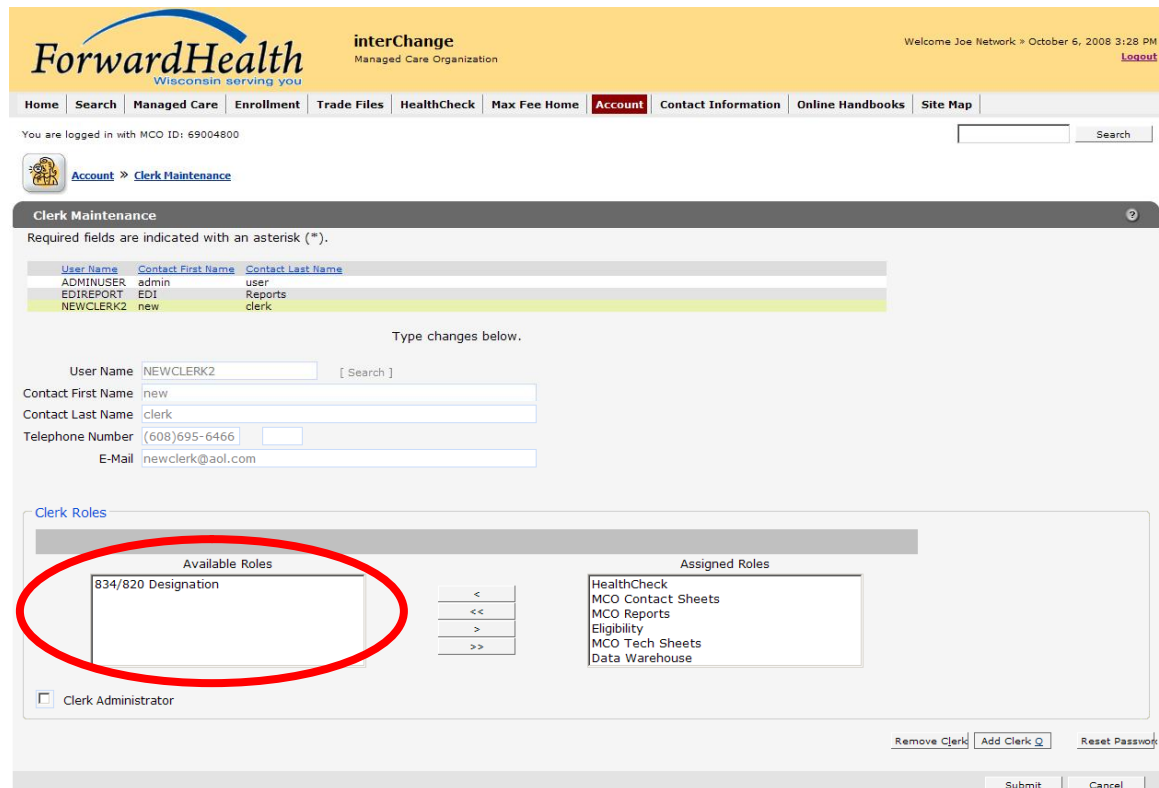
Section 2: Member and Provider Search Functionality

Once the role has been assigned to the user, the user can log in and will see a new menu item called "iC Functionality" at the top of their screen.

Clicking on the "iC Functionality" menu will bring up the following options:

iC Functionality
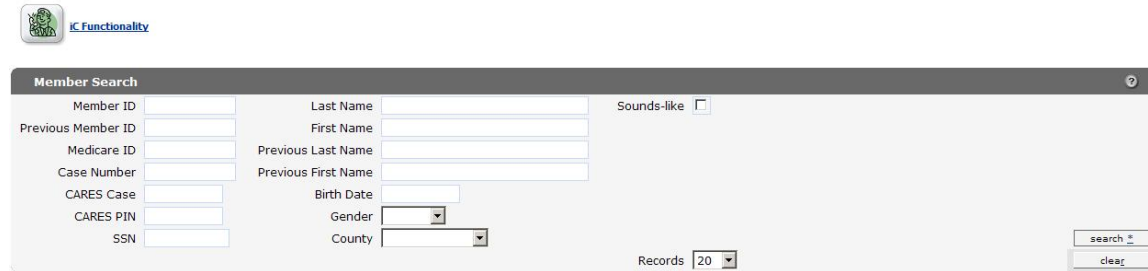
Member

- Member Search

- Member Information

Provider

- Provider Search

- Provider Information

Section 3: Member Search Functionality

Member Search
Clicking on "Member Search" will bring up the screen below. As you can see, this screen allows a greater range of options for searching on member information – including a name search and a "sounds-like" search. MCOs are encouraged to narrow their searches by as many fields as possible since search requests that produce too many results will return an error.

The screen below shows an example of the results returned when searching on the last name of "TESTUSER". As you can see at the bottom, there were at least 3 pages of results returned for this search request.
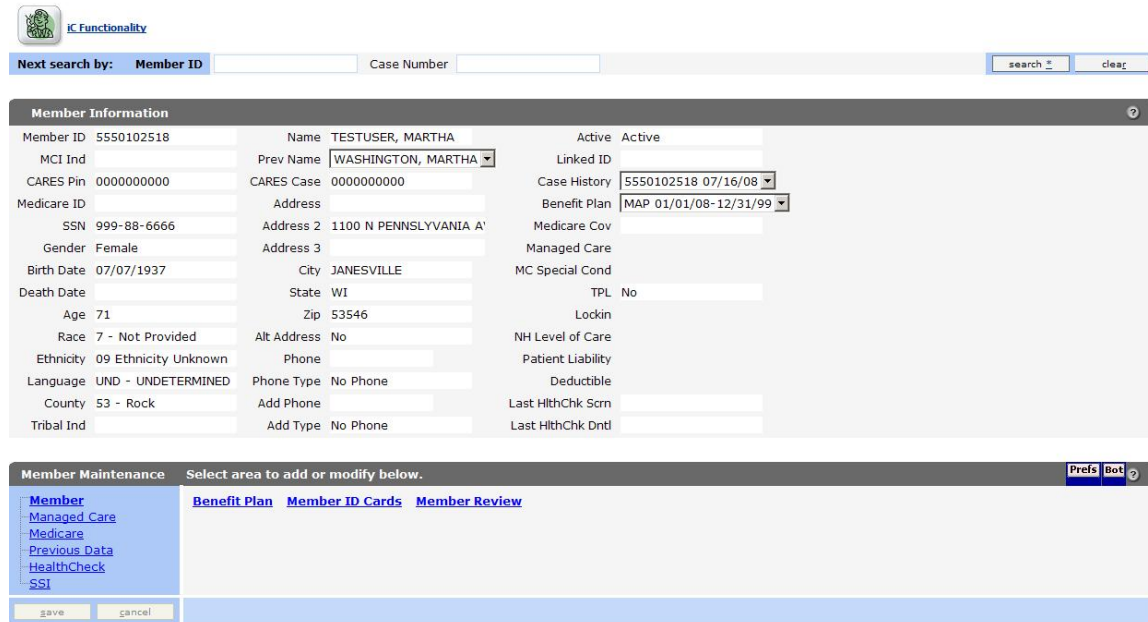
Member ID	Last Name	First Name	MI	Birth Date	SSN	Medicare ID	Gender	County
9000060192	TESTUSER	PACE		08/22/1942	528-41-7639		M	Milwaukee
7000063173	TESTUSER	MAWCDC		01/01/1923	755-95-2369		M	Milwaukee
3000063137	TESTUSER	MEDICAID		01/01/1932	564-56-8956		F	Milwaukee
5550104002	TESTUSER	MANDATORY		09/19/1980	999-88-9939		F	Milwaukee
5550102518	TESTUSER	MARTHA		07/07/1937	999-88-6666		F	Rock
9010000024	TESTUSER	CLAIMSBPDB		01/01/1992	998-49-8498		F	Dane
5550100110	TESTUSER	HISTORIED		01/07/1964	999-88-9929		M	Dane
8101210989	TESTUSER	TWOENROLL		01/01/1950	786-55-4656		M	Dane
5550100051	TESTUSER	ELISA		05/25/1990	999-88-9941		F	Dane
9010000033	TESTUSER	CLAIMSBPDK		01/01/1969	784-84-5616		F	Dane
9010000035	TESTUSER	CLAIMSBPDM		01/01/1975	978-94-4656		F	Dane
6000062761	TESTUSER	TESTA		01/01/1980	456-28-8655		M	Dane
1000063119	TESTUSER	FOURDATA		01/01/1920	125-47-8965		M	Milwaukee
9010000032	TESTUSER	CLAIMSBPDJ		01/01/1972	745-61-6561		F	Dane
4000060848	TESTUSER	CLAIMSBPD		01/01/1995	415-98-9487		F	Dane
8000060086	TESTUSER	CAPSPECIAL		12/15/1960	456-79-1257		M	Fond du Lac
9000059399	TESTUSER	EXTENDED		05/02/1974	541-23-6541		M	Kenosha
5000063155	TESTUSER	BADGERCARE		01/01/1922	584-98-9848		F	Milwaukee
8000063182	TESTUSER	MAWCDK		01/01/1947	544-86-4545		F	Milwaukee
9010000034	TESTUSER	CLAIMSBPDL		01/01/1999	657-85-4599		F	Dane

1 2 3 Next >

MCO's must select the row (by clicking on it) to bring up detailed information on the member they are looking for.

Below is an example of the initial information that is provided on the member:

The "Member Maintenance" Menu is shown at the bottom of the screen. This allows the user access to more specific information for the member. By clicking the categories on the left (Member, Managed Care, Medicare, etc…) the user will be given sub-menu options to choose from.

In the above example, the category "Member" is selected, which reveals sub-menu items of "Benefit Plan", "Member ID Cards", and "Member Review".

MCOs will only have access to the following "Member Maintenance" Categories:
- Member
- Managed Care
- Medicare
- SSI

MCOs will NOT have access to:
- Previous Data
- HealthCheck

Benefit Plan Information

The sub-menu "Benefit Plan" shows the screens below. If multiple benefit plans had shown up, the user would be able to select them. In the example below, the member only has one benefit plan (MAP).

Note that the Medical Status Code information is also displayed for the Benefit Plan.

Below is an example of all three sub-menus and their associated screens:

Member Maintenance	Select area to add or modify below.			Prefs	Bot

Member
Managed Care
Medicare
Previous Data
HealthCheck
SSI

Benefit Plan   **Member ID Cards**   **Member Review**

save   cancel

Benefit Plan

Status [Active Only ▼]   Benefit Plan [_____ ▼]   search *
                                                                  clear

Benefit Plan	Status	Stop Reason	Plan Type	Financial Payer	Effective Date	End Date	Worker ID
MAP Medicaid Purchase Plan	Active	None	BNFT	1 Medicaid	01/01/2008	12/31/2099	

Select row above to update -or- click Add button below.

Benefit Plan [_____ ▼]   Effective Date [_____]
Status [Active ▼]   End Date [_____]
Stop Reason [_____ ▼]
Plan Type
Financial Payer [_____ ▼]   Worker ID [_____]

                                              delete   add Q

-Medical Status Code Data-   Select row below to update -or- type data below to add.

*** No rows found ***   Type data below for new record.

Medical Status Code [_____ ▼]
Medical Status Code Status [Active ▼]
Medical Status Code Effective Date [_____]
Medical Status Code End Date [_____]
Agency [_____ ▼]

                                              delete   add Q

Member ID Cards

Date Issued	Issue Reason	Card Type	Active Indicator	PAN	Source	Return Reason
07/11/2008	Change	ForwardHealth ID Card	Active	1000000000003462	PS/2	00 - Active card, not returned

Select row above to view the data.

Date Issued [_____]   Issue Reason [_____]
Card Type [_____]   PAN [_____]
Address 1 [_____]   Source [_____]
Address 2 [_____]   Active Indicator [Active ▼]
Address 3 [_____]   Return Reason [_____ ▼]
City [_____]
State [__]
Zip [_____]

Member Review

*** No rows found ***   Select row above to update -or- click Add button below.

Review Reason [_____ ▼]   Effective Date [_____]
Review Requestor [_____ ▼] End Date [_____]

                                              delete   add Q

Managed Care Information

If the "Managed Care" category is chosen, the "Member MCO Enrollment History" screen is displayed to the user, as seen below:

Medicare Information

If the "Medicare" category is chosen, the 4 Medicare sub-menus are displayed ("Medicare A Coverage", "Medicare B Coverage", Medicare Buy-In A Combined", and "Medicare Buy-in B Combined") sub-menu items are displayed to the user. In the example below, I have selected all sub-menu items in order to show the different fields on all of these screens:

SSI Information

If the "SSI" category is chosen, the 6 SSI sub-menus are displayed ("CTS Child Information", CTS Child Payment", "SSI Enrolled", "SSI Information", "SSI Payment History" and "SSI Unearned Income") sub-menu items are displayed to the user. In the example below, I have selected all sub-menu items in order to show the different fields on all of these
screens:

Member Maintenance	Select area to add or modify below.			Prefs	Bot	?
Member	CTS Child Information	CTS Child Payment	SSI Enrollment			
Managed Care	SSI Information	SSI Payment History	SSI UnEarned Income			
Medicare						
Previous Data						
HealthCheck						
SSI						
save cancel						

CTS Child Information

*** No rows found ***

Select row above to update -or- click Add button below.

CARES Case Number [ ] DOB [ ]

Name [ ] [ ] MA App Date [ ]

SSN [ ]

[delete] [add ⊙] [Retro Payment]

-CTS Child Enrollment Data-

*** No rows found ***

Type data below for new record.

[delete] [add ⊙]

SSI Information

Representative Payee [ ] Payee Date [ ]

Payee Type [ ]

Auth 1 [ ] Auth 2 [ ]

Grand Fathered [No ▾] Category/Type [▾]

Competency [ ] SSA District Office [▾]

Record ID [▾] Application Date [ ]

Deny Code [ ] Deny Date [ ]

Optional Elig Date [ ] Trans Code [ ]

Appeal Decision [▾] Decision Date [ ]

Appeal Code [▾] Appeal Date [ ]

Essential Person [▾] Elig Spouse/Parent SSN [ ]

Death Code [▾]

Date Added [ ] Date Last Updated [ ]

CTS Child Payment

*** No rows found ***

SSI Payment History

Financial Cycle Date [ ]

Benefit Month [ ]

[search *]

[clear]

*** No rows found ***

SSI Enrollment

*** No rows found ***

Select row above to update -or- click Add button below.

Medicaid Enrollment [▾]

Payment Status [▾]

Effective Date [ ]

End Date [ ]

State Only [B-MA Only 1619b Recip ▾]

State Living Arrangement [- Individual is in a non-Title XIX ▾]

Federal Living Arrangement [- Individual is in a non-Title XIX ▾]

Jurisdiction State [▾]

Jurisdiction County [▾]

Federal Gross Amount [ ]

Federal Paid Amount [ ]

Earned Income Estimate [ ]

Self Employed Income Est [ ]

Earned Income Exclusion [ ]

Work Expense Blind [ ]

[delete] [add ⊙]

SSI UnEarned Income

*** No rows found ***

Select row above to update -or- click Add button below.

Claim ID [ ]

Income Amount [ ]
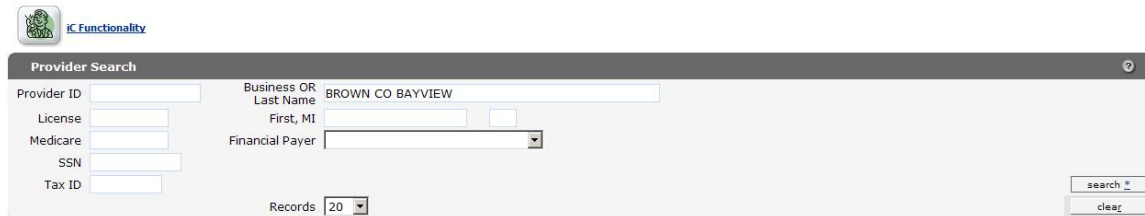
Effective Date [ ]

End Date [ ]

Income Type [▾]

Frequency [▾]

Validity [▾]

[delete] [add ⊙]

Section 4: Provider Search Functionality

Provider Search
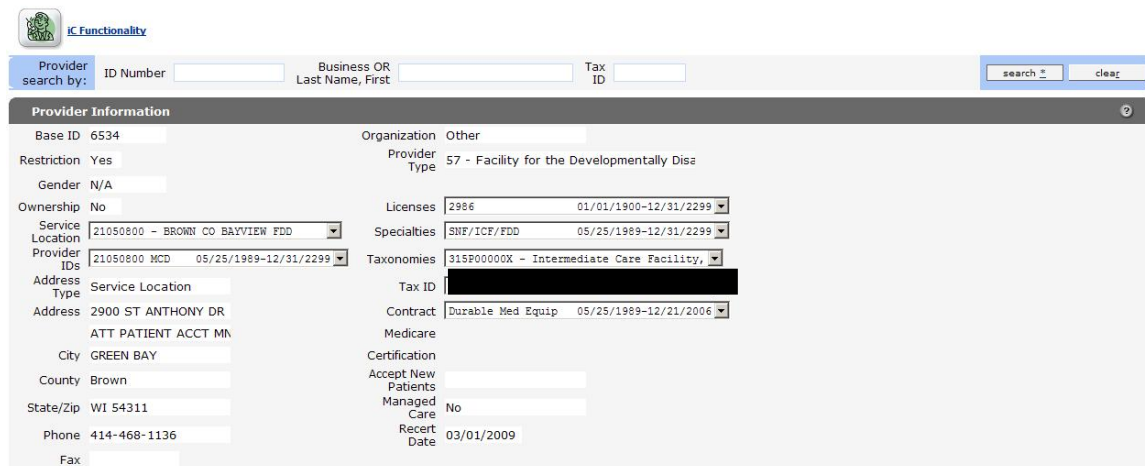
Below is an example of the Provider Search function:

Provider Information

An example of the resulting details screens for the provider record that was found by doing the search: